DOCUMENT RESUME

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ABSTRACT

A tech prep program in financial services, called Chicago Academy of Finance, was developed at Jones Metropolitan High School of Business and Commerce in Chicago, Illinois. The program was designed to integrate vocational and academic skills, with an emphasis on critical thinking skills. Of the 39 students initially enrolling in the first 11th-grade tech prep class, 34 (87%) completed their first year. Most program completers were either African American (73.2%) or Hispanic (24.4%) and female (82.9%). More than 90% of these students completed the program with a grade-point average of C or better. All students eligible for internships were successfully placed in paid summer positions. A pre-academy for 9th- and 10th-grade students at Jones High School was also launched in September 1992. The program benefited from significant participatory planning and involvement of a local summer youth jobs program and business advisory council and received the Connections 2000 award for innovative curriculum integration development. (Appendixes include the following: project brochures and publicity materials; a list of implementation team members; student performance standards by program year; learning objectives, standards, and evaluation methods; program philosophy and academic and social policy statements; and reports on the project appearing in the school's newspaper.) (MN)

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FINAL REPORT ABSTRACT

ED 361 542

Official Project Title: Tech Prep Program in Financial Services
DAVTE Funding Agreement Number: N/A
Project Director: Diana L. Robinson
Funded Agency: Jones Metropolitan High School of Business and Commerce
Location of Funded Agency: 606 South State Street, Chicago, Illinois, 60605
Time Period Covered: September 1, 1991 - August 31, 1992

Goals of Project and Relevancy to Vocational Education: This first year Tech Prep implementation grant incorporates the goals stipulated under the federal Carl D. Perkins Vocational and Applied Technology Act of 1990:

- Integration of vocational and academic skills, with an emphasis on critical thinking skills;
- Teaching of "all aspects of the industry";
- Provision of services to special needs students;
- Participatory planning of students, parents, school staff, community representatives and business in developing programs.

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Major Accomplishments of the Project:

- Of the 39 students initially enrolling in the first 11th grade Tech Prep class at Jones High School, 34 (87%) completed the first year.
- Seven new students were enrolled in the program early in the school year, bringing the total completing the first year to 41.
- A majority of these 41 students were either African-American (73.2%) or Hispanic (24.4%) and female (82.9%), thereby providing career opportunities to groups historically underrepresented in professional financial services positions.
- More than 90% of these students completed with a GPA of "C" or better.
- All of the students eligible for internships were successfully placed in paid summer positions.
- Program planning and student recruitment occurred for the launch of a Pre-Academy for 9th and 10th grade students at Jones in September 1992.
- Significant participatory planning and involvement occurred through the Chicago Academy of Finance Advisory Board, the Career Preparation Initiative in Financial Services, Corporate Chicago "Hire the Future" (a summer youth jobs program), and the Business Advisory Council and Local School Council of Jones High School.
- The Tech Prep Program in Financial Services at Jones High School received the Connections 2000 Award for innovative curriculum integration development.

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Products Delivered:

- Portfolio of Progress, 1 copy, delivered to CPS in May 1992
- Final Report, 2 copies, delivered to CPS on July 10, 1992
- Videotape, 3 copies, to be delivered to CPS by July 31, 1992
- Employer brochure and multi-purpose marketing kit, 15 copies, to be delivered to CPS by July 31

CE 066 521

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2. MAJOR ACCOMPLISHMENTS AND SIGNIFICANT FINDINGS OF THE PROJECT

This program year witnessed the successful launch of a Tech Prep program in financial services at Jones Metropolitan High School. The community college partner of this program is Harold Washington College, one of the eight City Colleges of Chicago. A charter class of 39 students was recruited, screened and enrolled; teachers were selected and a curriculum implemented; special activities to introduce students to professionals and careers in financial services were provided; and paid summer internships were developed for all students who completed the program with at least a "C" average. All but two of the eight program outcomes identified in the grant proposal have been accomplished, with the remaining two nearly completed.

This Tech Prep program, called the Chicago Academy of Finance (CAF), is unique in three respects: (1) it is located in the only two-year public business high school in the nation; (2) it is based on an academy model of academic and vocational preparation developed by the National Academy Foundation; and (3) it is being significantly strengthened through the work of a public-private employer committee named the Implementation Team (I-Team) of the Career Preparation Initiative in Financial Services (CPI-FS).

Program activity during this first year of operation clustered in four categories: the recruitment, selection and education of the charter Tech Prep class; program support provided by the CAF Advisory Board; the program enhancement work of the CPI-FS I-Team; and the development and launch of a pre-Academy for 9th and 10th graders at Jones High School. Activity highlights are provided below for each of these categories.

A. Recruitment, Selection and Education of Charter Class

- 39 students were screened, interviewed and enrolled as the charter CAF class (see Attachment A, recruitment brochure). Another 7 were admitted early in the school year. Forty-one students completed the first year.
- Of these 41 students, a majority were either African-American (73.2%) or Hispanic (24.4%) and female (82.8%), thereby preparing these youth for careers in which they have historically been underrepresented.
- 4 teachers were selected and prepared to teach core academic and vocational courses.
- Special activities were planned and executed to complement the academic offerings: monthly breakfasts with financial services employers; election of CAF class officers; assignment of mentors; visitation by the Atlanta Academy of Finance; and special events to launch the program (Attachment B) and honor students who completed their first year of the program.

B. Program Support Provided by CAF Advisory Board

- The 17-member CAF Advisory Board met monthly to review progress of the Tech Prep program and offer assistance (see Attachment C, Advisory Board list).
- To demonstrate their support and enthusiasm for the program, the Advisory Board agreed to provide $2,000 college scholarships for every student in the charter class who completes the program with a 3.5 or better GPA and at least a 95% attendance rate.
- The companies on the Advisory Board provided speakers and corporate material at monthly breakfasts with students.

- Coopers & Lybrand hosted a reception honoring students who completed the first year of the program (Attachment D).
- Advisory Board companies provided almost one-third of the paid summer internships needed for students.

C. **Program Enhancement Work of CPI-FS I-Team**

The 40 member Implementation Team (I-Team) of the Career Preparation Initiative in Financial Services (see Attachment E, I-Team list) met throughout this grant year and accomplished the following:

- Identified and validated industry-wide 138 performance standards in six skill areas that students should master by the completion of the four-year Tech Prep program (Attachment F).
- Translated these performance standards into 30 learning objectives (Attachment G).
- Drafted an academic philosophy (Attachment H) and a student social and academic policy (Attachment I).
- Hired a consultant to produce a videotape intended to recruit CEO-level support to the program, an employer-directed brochure, and a multi-purpose marketing piece. (To be forwarded by July 31, 1992.)
- Convened a Curriculum Development Committee to ensure that all performance standards and learning objectives are adequately addressed in the four-year curriculum (Attachment J, Scope of Work).

D. **Pre-Academy of Finance**

To ensure that students are academically prepared to enter the Chicago Academy of Finance at Jones High School in the 11th grade, Jones will launch a pre-Academy for 9th and 10th grade students in the fall of 1992. This will be the first class of 9th graders to enroll at Jones. Related activities included:

- Development of a recruitment brochure (Attachment K).
- A breakfast meeting with school principals and counselors (Attachment L).

Eight objectives were identified for this Tech Prep grant. They are listed below with a brief assessment of progress toward each.

A. Relevant and comprehensive set of industry performance standards identified.

Progress. ACCOMPLISHED. Through the CPI-FS I-Team, 138 performance standards were identified in six skill categories. These have been validated by a representative cross-section of the financial services industry through the use of focus groups in three sectors not strongly represented on the I-Team: real estate, insurance, and securities/commodities/brokerage.

B. Comprehensive set of measurable student competency outcomes for program are established.

Progress. ACCOMPLISHED. Thirty learning objectives were developed by the Competency Development Committee of the I-Team and approved by the full I-Team. These specify standards of performance and evaluation methods.

C. Students learn industry-identified performance standards.

Progress. ACCOMPLISHED. The learning objectives described above correlate to the industry-identified performance standards. A team of academic and vocational instructors at the secondary and post-secondary levels are currently reviewing existing curriculum materials to ensure that these objectives are effectively addressed in the Tech Prep curriculum.

D. Classroom teaching is reinforced and complemented by experiential learning.

Progress. ACCOMPLISHED. The 34 students who completed the first year of their academic and vocational preparation and remain in the program have all been placed in summer internships. Students will work for a minimum of six weeks and at least 20 hours per week. Employers include:

Aon Corporation
Central City Productions
Chicago Tokyo Bank
Chicago Tribune
CitiBank
City of Chicago
Ernst & Young
First National Bank of Chicago
Gardner Rich & Co.
Harris Bank
Illinois Bell
Kemper Securities, Inc.
LaSalle Bank Lakeview
Leo Burnett
Midwest Stock Exchange
The Northern Trust Company
Northwestern Railroad
Prudential Realty Group
Shearson Lehman Brothers, Inc.
South Shore Bank

These work experiences will enable students to apply on-the-job the skills and knowledge they acquired in the classroom. In addition, monthly breakfasts with various financial services representatives have allowed students to meet and discuss career options and workplace requirements directly with employers.

E. Students actively use academic skills in the vocational setting.

Progress. NEARLY COMPLETED. The main thrust of the curriculum development activity currently under way is to integrate basic academic skills into vocational curriculum. This work will implement the mandate of the Career Preparation Initiative I-Team to build a solid academic foundation into the Tech Prep Program.

All curriculum integration recommendations will be formulated by the end of the summer for implementation during the '92-'93 academic year.

F. Instructors are able to effectively teach the Tech Prep curriculum.

Progress. PARTIALLY ACCOMPLISHED. All teachers involved with the Tech Prep Program at Jones High school have participated in planning meetings and received satisfactory evaluations from the Principal's Office. Two areas will be emphasized next year: assessing the college Tech Prep component in terms of instructional techniques and assessing in detail teachers' technical assistance needs at both the secondary and post-secondary levels.

G. Student retention and completion of the Tech Prep program is high.

Progress. ACCOMPLISHED. Of the 39 students who initially enrolled in the Tech Prep Program this year, only five dropped out of the program before the end of the first year resulting in a retention rate of 87%. Seven new students were admitted into the program over the course of the school year, resulting in an enrollment of 41 students at the end of the

summer. Of these 41 students, four transferred out at the end of the school year, resulting in a net enrollment of 37 students.

As evident in the following grade point distribution, academic achievement of the Tech Prep students was significant. Only four of the 41 students completing the first year of the Tech Prep program earned a GPA below 2.0 (on a 4.0 scale).

G.P.A.	No. of Students	% of Total
3.5 - 4.0	4	9.8
3.0 - 3.49	12	29.2
2.5 - 2.99	12	29.2
2.0 - 2.49	9	22.0
Below 2.0	4	9.8
Total	41	100.0

H. Effective student and employer recruitment strategies are in place.

Progress. ACCOMPLISHED. As a result of student screening and targeted outreach, more applicants than program slots were generated for this first class. The resulting enrollment was at the desired level. Adequate employer involvement has been forthcoming through the Chicago Academy of Finance Advisory Board, the CPI-FS Implementation Team, and Corporate Chicago Hire the Future, a private sector summer jobs program for Chicago youth.

3. EVALUATION AND IMPACT

Evidence of program effectiveness is provided by:

- a student retention rate of 87%;
- a student academic achievement rate of 91.2% receiving a "C" or better GPA;
- a 100% student placement rate for summer internships;
- significant employer support and involvement through the CAF Advisory Board and the CPI-FS Implementation Team.

4. RESOURCE LISTINGS

A. Attachment M contains an itemized list of all instructional materials purchased through this grant.

B. The following individuals were paid by the grant:

Diana Robinson, Director, Chicago Academy of Finance
Annie Miller, Teacher Specialist/CAF Coordinator, Jones High School
Linda Hannah, Women Employed (mentor program)

C. Paid Participants: Same as 4.B. above

D. Unpaid Participants: See Attachments C and E for lists of individuals serving in an advisory capacity to the program.

In addition to CAF Advisory Board members, the following individuals participated in the monthly breakfasts and spoke to the students about careers in financial services.

Lauren Claire, Auditor, Arthur Andersen & Co.
Dallas Creitlon, Tax Consultant, Arthur Andersen & Co.

Lawrence Geraghty, Senior Vice President, Shearson Lehman Bros.
Felicia Haraway, Ernst & Young
Karen Jones, Manager of Travel Services, American Express Co.
Marya Kovacik, Corporate Training, The Northern Trust Company
James Lowry, First Scholar, First National Bank of Chicago
Sharon Marioka, Financial Services Representative, American Express Co.
James Mason, First Scholar, First National Bank of Chicago
Eric Nance, Ernst & Young
Michael Richards, Manger, Arthur Andersen & Co.
Levoyd Robinson, Corporate Banking Office, First Chicago
Michael Skinner, Vice President, Shearson Lehman Bros.
Al Thomas, Financial Consultant, Shearson Lehman Bros.
Bruce J. Williams, Staff, Arthur Andersen & Co.

The only significant problem encountered during the grant period was a delay in the start-up of the curriculum development effort. This was due to the work plan of the CPI-FS I-Team, who did not sign off on the learning objectives until April 1992. However, a team of secondary and post-secondary academic and vocational teachers has been assembled for this project and work will be completed by the beginning of the '92-'93 academic year.

6. CONCLUSIONS AND RECOMMENDATIONS

- A Tech Prep program can succeed only if all three partners — the community college, high school, and employer community — are actively involved in program planning and implementation.

- An important benefit of an effective Tech Prep planning process is the education and sensitization of the partners to each others' perspective, issues, and capabilities.

- There is significant employer support for a Tech Prep program in financial services provided that employers have validated student competencies, are involved in program development, and have confidence in the educational partners' ability to deliver on their responsibilities.

- Employer commitments should be sought for student work experiences at least six months prior to the start of such experiences to ensure timely placement and start-up.

7. PUBLICITY

The activities of the Jones Tech Prep program were regularly covered in the school newspaper, copies of which are appended as Attachment N.

The Jones Tech Prep program received a Connections 2000 award from the Illinois State Board of Education for innovative curriculum integration development efforts.

The only other publicity consisted of the placement of a recruitment advertisement in the Chicago Sun-Times, the Polish Daily News, the "Stardust" (a digest of National Eastern Star/Masonic/Shriner news and events), and the Burnham Park "1992 Directory." Attachment O presents the advertisement appearing in these publications.

Visitors to the project site not listed elsewhere in this report included the following individuals:

Adrienne Bailey, Deputy Superintendent, Chicago Public Schools
Atlanta Academy of Finance, Director and Students
Business Advisory Council Members, Jones High School
Local School Council Members, Jones High School
Phyllis Frankfort, Executive Director, National Academy Foundation
Grady Jordan, High School District Superintendent
Ted Kimbrough, Superintendent, Chicago Public Schools
Shirley Macklin, Interim Manager, Tech Prep, Chicago Public Schools
Bernadette Toomey, Vice President, National Academy Foundation
Susan Zimny, Program Director, National Academy Foundation

Attachment

Eligibility Requirements

Any Chicago high school student, whether in a private or public school, who has a "B" average and 95% attendance rate is eligible for CAF. To be accepted into the program you must complete the CAF application, interview with the CAF Coordinator at Jones Metropolitan High School, and sign a two-year agreement to follow the CAF program and its requirements. The student's parents must also sign a consent form.

Limited Space - Apply Now!

A limited number of students are accepted into the Chicago Academy of Finance. Applications are accepted year-round and are considered in the order of their receipt. Students are encouraged to apply early in their sophomore year. To receive an application form, complete the enclosed request form or contact:

Ms. Annie B. Miller
Coordinator, Chicago Academy of Finance
Jones Metropolitan High School
606 South State Street
Chicago, IL 60605
(312) 534-8600

The Chicago Academy of Finance operates in partnership with these sponsoring companies:

American Express
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The Northern Trust Co.
Shearson Lehman Bros.

Cozette Buckney
Principal
Jones Metropolitan High School

Diana L. Robinson
Director
Chicago Academy of Finance

TO:

Ms. Annie B. Miller, Coordinator
Chicago Academy of Finance
Jones Metropolitan High School
606 South State Street
Chicago, IL 60605

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JONES METROPOLITAN HIGH SCHOOL OF BUSINESS AND COMMERCE

Introduces the New

CHICAGO ACADEMY OF FINANCE

for

High School Juniors and Seniors

Jones Metropolitan High School
606 South State Street
Chicago, IL 60605

A Program of the National Academy Foundation
and
A Tech Prep Program
Illinois State Board of Education
Department of Adult, Vocational and Technical Education

A New Business Program for Public High School Students

The Chicago Academy of Finance (CAF) is a unique high school business program designed to help 11th and 12th grade students learn about Chicago's financial services industry both in the classroom and on-the-job.

CAF introduces students to the array of sectors comprising Chicago's world-class financial community: accounting, banking, securities and commodities exchanges, brokerage, insurance, and real estate.

CAF Prepares Students for College or the Workforce

Students who successfully complete the CAF program at Jones Metropolitan High School are strongly encouraged to attend college to pursue their business studies. One option is a two-year Chicago Academy of Finance program offered at Harold Washington College for students interested in acquiring an Associate Degree. From there, students may transfer to a senior institution to obtain their baccalaureate degree.

Graduates of CAF at Jones Metropolitan High School are also qualified for a variety of entry-level positions throughout the financial services industry.

Unique Features

A program of the National Academy Foundation, CAF is one of 45 finance academies across the United States. Several unique features characterize all Academies of Finance:

Specialized classes in finance developed by business experts.

Paid summer internships after the 11th year of high school.

College-level class experience in the senior year.

- *Opportunities to establish personal contacts with professionals in the industry.*

Intensive Academic and Vocational Preparation

Students accepted into CAF follow a two-year academic and vocational program. Following are the classes required for each year.

Junior Year

World of Finance/Securities Operations
Typing I
Business English I
Electronic Business Procedures
Computer Math Fundamentals/Applications
High School Reading Improvement/Oral Communications and Speech
Accounting I and II
Foreign Language
Physical Education

Senior Year

Banking and Credit/Financial Planning
United States History
Business English II
College-Level Business Class
Foreign Language
Physical Education

Special CAF Activities

Students enrolled in the Chicago Academy of Finance also participate in numerous special activities designed to further their understanding of the financial services sector. These include:

- Stock Market Game
- Speakers from the financial services industry
- Trips to local financial services companies
- Business skills workshops
- Exchange trips to other Academy of Finance schools (outside of Chicago)
- Special graduation ceremony (senior year)

Local and National Business Resources

An Advisory Board consisting of senior executives in Chicago's financial services industry and local educators keeps the Chicago Academy of Finance up-to-date and relevant to today's workplace.

The National Academy Foundation (NAF) provides additional resources from a national perspective. NAF was established in 1982 to encourage and support partnerships between business and education to strengthen the preparedness of the American workforce. NAF provides professional development opportunities for teachers; a national network among students, teachers and business participants; and copyrighted curriculum material in financial services operations.

The Academy of Finance Works!

Based on a national random survey of graduates from Academies of Finance, the following findings emerged:

- *92% of the program graduates reported that the Academy of Finance helped them to make concrete career decisions.*
- *90% said that the program prepared them for employment.*
- *95% of all graduates went on to college.*
- *68% of program graduates are working, and half of them in the financial services area.*
- ***The Academy of Finance has proven an excellent vehicle for young women and minority youth to access nontraditional, well-paying jobs with career potential. These graduates performed as well in post-secondary education and employment outcomes as other youth in the program.***

CHICAGO ACADEMY OF FINANCE
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Related Services Co., Inc.

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The Northern Trust Co.

Bernard Spillman
Assistant Superintendent
Chicago Public Schools

Chicago Academy of Finance
Administrative Staff

Diana L. Robinson - Program Director
Violin Hughes - Coordinator, Harold Washington College

Program Office
30 East Lake Street - Room 1105
Chicago, IL 60601
(312) 984-2775

INAUGURATION OF THE

CHICAGO ACADEMY OF FINANCE
AT
JONES METROPOLITAN HIGH SCHOOL
OF BUSINESS AND COMMERCE

AND

INTRODUCTION OF THE CHARTER CLASS

September 16, 1991

Sponsored by

THE CHICAGO PUBLIC SCHOOLS
in partnership with
THE NATIONAL ACADEMY FOUNDATION
and
THE ADVISORY BOARD OF THE
CHICAGO ACADEMY OF FINANCE

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INAUGURATION OF THE
CHICAGO ACADEMY OF FINANCE
AT
JONES METROPOLITAN HIGH SCHOOL
OF BUSINESS AND COMMERCE

September 16, 1991

PROGRAM

Welcome
COZETTE BUCKNEY
Principal, Jones Metropolitan High School

Introductory Remarks
DONALD E. BROWN
Chair, Chicago Academy of Finance Advisory Board

Introduction of the Charter Class
COZETTE BUCKNEY
Assisted by Ann Miller, Teacher Specialist

Remarks
TED KIMBROUGH
Superintendent, Chicago Public Schools

NELVIA M. BRADY
Chancellor, City Colleges of Chicago

ISABEL STEWART
Director for Program Administration
National Academy Foundation

Recognition of Outstanding Board Contribution
to Christopher Gardner
DONALD E. BROWN

Concluding Remarks
BERNARD SPILLMAN
Assistant Superintendent, Chicago Public Schools

Adjourn to Reception

Special Thanks to Ernst & Young for Printing this Program

CHICAGO ACADEMY OF FINANCE
JONES METROPOLITAN HIGH SCHOOL

CHARTER CLASS 1991

William Alexander
Norma Aranda
Lakeisha Beans
Asantewaa Beasley
Lakena Boyd
Nicole Clark
Willie Curry
Peliar Durden
Giova Espinoza
Adrienne Farmby
John Frederick
Gina Griffin
Salvador Guerrero
Latrese Harwick
Graciela Iturbe
Tanya Jackson
Jeretheam Jones
Cherrie Little
Jacqueline Little
Venita Lockett
Tamara Mckenzie
Latrea Morrow
Shancim Newton
Timothy Parker
Takenya Peek
Ivy Porter
Hubert Ptak
Deborah Rainey
Shelley Riggs
Esmeralda Roque
Helen Rucker
Beatriz Sanchez
Irma Sanchez
Patricia San Martin
Howard Schabow
Cheryl Scott
Tasha Underwood
Jaime Villanueva
Tamara Wright

TEACHING STAFF

Maggie Culver - Accounting Teacher
Joseph Zale - Economics Teacher

Ann Miller - Teacher Specialist

ATTACHMENTS TO TECH PREP FINAL REPORT

A - Basic Tech Prep Recruitment Brochure
B - Program for the Kick-Off Event
C - Chicago Academy of Finance Advisory Board Members
D - Program for Reception Honoring Tech Prep Students
E - Career Preparation Initiative in Financial Services - Full Implementation Team
F - Financial Services Performance Standards
G - Learning Objectives, Standards and Evaluation Methods
H - Career Prep Educational Philosophy
I - CPI-FS Academic and Social Policy
J - CPI-FS Scope of Work
K - Basic Pre-Academy Recruitment Brochure
L - Program for Pre-Academy Breakfast Meeting
M - Itemized Listing of Instructional Materials
N1 - N6 - Jones Reporter Articles
O - Chicago Academy of Finance Recruitment Advertisement

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Vice President
Unit Manager Specialized Div. CFSD
The First National Bank of Chicago

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BERNARD SPILLMAN
Assistant Superintendent
Chicago Public Schools

MIKE TORTELLERO
Mgr., Finance/Operations
American Express Travel

Chicago Academy of Finance

Diana L. Robinson - Director

Jones Metropolitan High School

Annie Miller - CAF Coordinator
Maggie Culver - Accounting Instructor
Ann Hebert - French Instructor
Meryl Tillery - French Instructor
Earl Silverman - Financial Planning Instructor
Joseph Zale - Economics Instructor

Special Thanks to Jeanne Carey and William Micali, Assistant Principals

Harold Washington College

Violin Hughes - Student Resource Manager

RECEPTION FOR STUDENTS OF THE

CHICAGO ACADEMY OF FINANCE
AT
JONES METROPOLITAN HIGH OF BUSINESS AND COMMERCE

AND

HAROLD WASHINGTON COLLEGE

June 16, 1992

Sponsored by
The Chicago Academy of Finance Advisory Board

Hosted by
Coopers & Lybrand

PROGRAM

Welcome
HARRY HARCZAK
Coopers & Lybrand

Recognition of Special Guests
DIANA L. ROBINSON
Director, Chicago Academy of Finance

Introductory Remarks
DONALD E. BROWN
Chair, Chicago Academy of Finance
Advisory Board

Award of Certificates of Completion
DONALD E. BROWN
CHRISTINE A. FRANZ
Dean, Faculty and Instruction
Harold Washington College

Awards for Honor Roll and Attendance
COZETTE BUCKNEY
Principal, Jones Metropolitan High School
ANNIE MILLER
Coordinator, Chicago Academy of Finance
Jones Metropolitan High School

CONCLUDING REMARKS
Diana L. Robinson

CHICAGO ACADEMY OF FINANCE STUDENTS

Graduates from Harold Washington College

LaShaun D. Anderson
Mitzi J. Baker
Kevin R. Cason
Sheila R. Clayton
Karl V. Wilson

Jones Metropolitan High School Charter Class

- • William Earl Alexander
- # Norma Aranda
- Asantewaa Beasley
- Lakena Boyd
- Ceetter Carpenter
- Nicole Clark
- # Willie Curry
- # Peliar Durden
- # Giovanna Espinoza
- Adrienne Farmby
- John Frederick
- Gina Griffin
- • Salvador Guerrero #
- • Latrese Hardnick #
- Leslie Hull
- Graciela Iturbe
- • Tanya J. Jackson
- • Jeretheam Jones
- Cherrie Little
- Jacquelyne Little
- • Venita Lockett #
- Tamara Mckenzie
- Eboni Miller
- Latrea Morrow
- Timothy Parker
- Tekenya Peek
- • Ivy K. Porter #
- • Deborah Rainey
- Esmeralda Roque
- • Helen Rucker
- Sonnella Russell
- Patricia San Martin
- # Beatriz Sanchez
- Irma Sanchez
- Howard Schabow
- Cheryl Ann Scott
- • Tiffany Thames #
- Tasha Underwood
- Nora Vera
- Jaime Villanueva
- # Shantii Wilson
- • Tamara D. Wright

• Honor Roll # Perfect Attendance

Class Officers

Ceeter Carpenter - ***Secretary***
Adrienne Farmby - ***President***
Latrese Hardnick - ***Vice President***
Cheryl Ann Scott - ***Treasurer***
Nora Vera - ***Associate Secretary***

CAREER PREP INITIATIVE - FINANCIAL SERVICES

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FINANCIAL SERVICES CAREER TRAINEE
PROPOSED PERFORMANCE STANDARDS BY PROGRAM YEAR

Following is a proposed list of suggested performance standards to be addressed by the Career Preparation Initiative in Financial Services (CPI-FS) over the four years of education and training comprising that program. The focus of these standards is the knowledge and skills necessary to master any entry level position within the financial services industry. It is expected that students will acquire additional knowledge and skills required by the Illinois Board of Education and Illinois Community College Board in the course of their educational programs.

Standards reflected in this inventory are taken from five sources:

- existing curriculum material from the Chicago Public Schools, the City Colleges of Chicago, and the National Academy Foundation;
- basic skills identified by employer representatives on the CPI-FS Implementation Team;
- a DACUM ("Developing a Curriculum") process conducted for CPI-FS;
- skills identified by the national Secretary's Commission on Achieving Necessary Skills (SCANS); and
- a series of focus groups held with representatives of the insurance, real estate and securities/commodities/brokerage sectors in December 1991.

These performance standards have been validated by a cross-section of Chicago's financial services industry and reflect three key dimensions:

1. The level of attainment: partial knowledge ("PK") or mastery ("M").
2. The point at which the standard should be attained (years 11-12 or 13-14, the latter two years occuring in the community college system).
3. Whether some amount of learning should occur in the workplace and during which years of the program. This is indicated by a "Yes" in the column under *"Workplace"*.

FINANCIAL SERVICES CAREER TRAINEE
PERFORMANCE STANDARDS BY PROGRAM YEAR

	Yrs. 11-12	Work-place	Yrs. 13-14	Work place
I. Basic Academic Skills				
A. Reading (locates, understands, and interprets written information in prose and documents)	M			
B. Writing				
1. Communicates thoughts, ideas, information, and messages in clear and grammatically correct writing	M			
2. Creates simple documents such as letter, directions, graphs	M			
3. Creates more complex documents such as manuals, reports, flow charts	PK		M	Yes
C. Arithmetic/Mathematics				
1. Performs basic computations	M			
2. Approaches practical problems by choosing appropriately from a variety of mathematical techniques	PK		M	
D. Listening (receives, attends to , interprets, and responds to verbal messages and other cues)	M			
E. Speaking				
1. Organizes ideas and communicates orally in a clear and grammatically correct manner	M			
2. Makes presentations and speaks publicly	PK		M	
F. Formulates and asks questions	M			
II. Thinking (*Note:* All thinking skills should be applied to a variety of situations)				
A. Thinks creatively (generates new ideas)	PK		M	Yes
B. Makes decisions (specifies goals and constraints, generates alternatives, considers risks, evaluates, and chooses best alternative)				
1. Simple decision-making	M	Yes		
2. Complex decision-making	PK	Yes	M	Yes
3. Ethical decision-making	PK	Yes	M	Yes
C. Solves problems (recognizes problems and devises and implements plans of action)				
1. Simple problem-solving	M	Yes		
2. Complex problem-solving	PK	Yes	M	Yes
D. Conceptualizes (organizes and processes symbols, pictures graphs, objects, and other information)	PK		M	Yes
E. Knows how to learn (uses efficient learning techniques to acquire and apply new knowledge and skills	PK		M	
F. Reasons (discovers a rule or principle underlying the relationship between two or more objects and applies it in problem solving)	PK		M	
G. Demonstrates understanding of "common sense" and "good judgement"	PK	Yes	M	Yes
III. General Vocational Skills				
A. Processes information				
1. Identifies a variety of methods/formats for organizing information/data	PK		M	Yes
2. Organizes data for entry	M			
3. Inputs and stores documents and files	M			
4. Maintains documents and files	M			
5. Prints and correctly distributes information	M	Yes		
6. Checks document for spelling, grammar, and accuracy	M			

	Yrs. 11-12	Work-place	Yrs. 13-14	Work-place
B. Operates a computer				
1. Understands basic computer concepts (PC and mainframe)	M			
2. Performs start-up functions	M			
3. Selects and sets document format and page specifications	M			
4. Inputs data in appropriate format	M	Yes		
5. Demonstrates editing functions	M			
6. Originates a data entry file	M			
7. Selects the appropriate file to add new data	M			
8. Prints mailable documents	M			
9. Edits records and modifies files for production	M			
10. Maintains a system of storage and retrieval	PK		M	Yes
11. Demonstrates basic knowledge of spreadsheet software including formatting, creating formulae, and printing	M			
12. Demonstrates basic knowledge of database software including retrieving files; deleting, adding, and sorting records; and formatting and printing reports	M			
C. Performs technical support duties				
1. Follows oral and written directions accurately	M			
2. Demonstrates keyboarding skills	M			
3. Reviews and organizes data for typing/keyboarding	M			
4. Processes incoming and outgoing mail	M			
5. Demonstrates proper business etiquette in greeting visitors/clients, making introductions, escorting visitors to proper area/person, offering assistance	M	Yes		
6. Performs telecommunications activities				
a. Demonstrates basic knowledge of telephone functions	M	Yes		
b. Demonstrates proper telephone etiquette/procedures	M	Yes		
c. Takes messages accurately	M	Yes		
d. Accesses voice mail messages; leaves clear, concise voice mail messages	M	Yes		
e. Prepares documents to be faxed	M	Yes		
7. Maintains office supplies and forms	M	Yes		
8. Demonstrates basic knowledge of office equipment, including simple maintenance	PK	Yes	M	Yes
9. Organizes, plans and prioritizes work activities	PK	Yes	M	Yes
10. Demonstrates alphabetic and numerical filing skills	M			
11. Transcribes verbal communications into written messages	M	Yes		
12. Demonstrates note-taking skills	M			
D. Communicates effectively				
1. Composes and prepares written business communication				
a. Determines purpose and audience	PK	Yes	M	
b. Organizes major ideas and composes ideas in clear and concise form	PK	Yes	M	
c. Demonstrates business vocabulary skills	PK	Yes	M	Yes
d. Spells correctly	M			
e. Uses proper grammar for business communications	M			
f. Demonstrates knowledge of acceptable letter and report formats	M	Yes		
2. Delivers oral business communication				
a. Makes recommendations to supervisors/co-workers	PK	Yes	M	Yes
b. Gives directions clearly and concisely	M			
c. Communicates clearly and concisely in pressure situations	PK	Yes	M	Yes
d. Responds appropriately to nonverbal or implied communication	PK	Yes	M	Yes
e. Speaks tactfully	M	Yes		
f. Does not use slang	M			

	Yrs. 11-12	Work-place	Yrs. 13-14	Work-place
3. Demonstrates interpersonal skills to solve problems				
a. Exercises leadership (listens to and communicates ideas to justify position, persuades and convinces others, responsibly challenges existing procedures and policies)	PK	Yes	M	Yes
b. Negotiates (works toward agreements involving exchange of resources, resolves divergent interests)	PK	Yes	M	Yes
c. Considers opinions and suggestions of others	M	Yes		Yes
d. Delivers and accepts constructive criticism and positive feedback from others	PK	Yes	M	Yes
e. Uses effective questioning and seeks out information to investigate problems	PK	Yes	M	Yes
4. Trains new employees				
a. Develops an on-the-job training program for a new employee, determining training needs, methods, and time frame			PK	Yes
b. Demonstrates training skills, implements training plan			PK	Yes
c. Reviews and assesses trainee's progress			PK	Yes
E. Customer/Employee Relations				
1. Understands importance of both internal and external customers	M			
2. Establishes a positive rapport with clients, customers	PK	Yes	M	Yes
3. Evaluates and prioritizes customer's concerns	PK	Yes	M	Yes
4. Offers optional/alternatives to meet customer needs			PK	Yes
5. Refers customers to proper departments	M	Yes		
6. Demonstrates knowledge of specific company's products and services			PK	Yes
7. Matches customer needs to product/services available			PK	Yes
8. Demonstrates product/service presentation skills			PK	Yes
9. Resolves misunderstandings and conflicts or refers problem			PK	Yes
IV. Industry-Specific Knowledge and Skills				
A. Demonstrates conceptual knowledge of:				
1. Purpose and function of business	PK		M	
2. How companies of all sizes are organized	PK		M	
3. Sectors comprising the financial services industry:				
a. banking and credit	PK		M	
b. insurance	PK		M	
c. real estate	PK		M	
d. securities/commodities/brokerage	PK		M	
e. accounting	PK		M	
4. Economics	PK		M	
5. Marketing, sales and distribution	PK		M	
6. Management	PK		M	
7. Personal investment fundamentals	PK		M	
8. Business law			PK	
B. Understands career opportunities in each financial services sector	PK	Yes	M	Yes
C. Accounting/Bookkeeping				
1. Records entries in journals and ledgers	M			
2. Identifies methods and formats for recording expenditures and receipts	M			
3. Maintains accurate records of financial transactions				
a. For a personal budget	PK		M	
b. For a corporate budget			PK	Yes
4. Compares actual expenditures to budget projections				
a. For a personal budget	PK		M	
b. For a corporate budget			PK	Yes

	Yrs. 11-12	Work-place	Yrs. 13-14	Work plac
5. Identifies variances and measures to bring expenditures in line with budget				
a. For a personal budget	PK		M	
b. For a corporate budget			PK	Yes
6. Prepares a personal income tax return	M			
D. Demonstrates familiarity with a particular vocational area within financial services (e.g. property maintenance)				
1. Understands technical terminology	PK	Yes	M	Yes
2. Understands basic operations	PK	Yes	M	Yes
3. Identifies relevant information sources for research purposes (if applicable)			M	Yes
V. Employability Skills				
A. Job-seeking				
1. Identifies employment opportunities	M			
2. Applies employment-seeking skills	M			
3. Interprets employment capabilities	M			
4. Prepares a resume	M			
5. Interviews for employment	M			
B. On-the-job				
1. Follows company policies and procedures	M	Yes		
2. Understands personal corporate benefits	M	Yes		
3. Maintains safe and healthy environment	M			
4. Maintains businesslike image	M			
5. Participates as a member of a team	M	Yes		
6. Works with a minimum of supervision	PK	Yes	M	Yes
7. Willingly accepts routine or repetitive tasks and performs performs them well	M			
8. Demonstrates courtesy	M			
9. Works with diversity (works well with men and women from diverse backgrounds and of varying ages)	M	Yes		
10. Demonstrates flexibility				
a. Adapts to change	M			
b. Demonstrates ability to identify the need for change	M			
c. Adjusts to emergency situations	M			
11. Meets timelines/deadlines	M			
12. Demonstrates neatness in work produced and work environment	M			
13. Initiates in identifying a problem/issue and takes appropriate action	PK	Yes	M	Yes
14. Understands the corporate mission and own role in organization	M	Yes		
15. Understands quality concepts, tools and principles	PK	Yes	M	Yes
VI. Personal Qualities				
A. Responsibility (exerts a high level of effort and perseveres towards goal attainment)	M	Yes		
B. Self-esteem (believes in own self-worth and maintains a positive view of self)	M	Yes		
C. Sociability (demonstrates understanding, friendliness, adaptability, empathy, and politeness in group settings)	M	Yes		
D. Self-management (assess self accurately, sets personal goals, monitors progress, and exhibits self-control	M	Yes		
E. Integrity/honesty (chooses ethical courses of action)	M	Yes		
F. Enthusiasm	M			
G. Willingness to learn	M			

LEARNING OBJECTIVES, STANDARDS AND EVALUATION METHODS CAREER PREPARATION INITIATIVE IN FINANCIAL SERVICES

BASIC ACADEMIC SKILLS

1. **Reading.** The student locates, understands, and interprets written information in prose and documents by identifying explicitly stated facts, drawing accurate inferences, and formulating appropriate generalizations necessary to perform college-level work.

2. **Writing.** The student writes thoughts, ideas, information, and messages by using correct grammar, spelling, capitalization, and punctuation and structuring sentences and paragraphs appropriately, organizing main and subordinate ideas, and recognizing basic writing conventions as measured by a grade of "B" or better in college English 101 (Composition I) or a "C" or better in college English 105 (Business Writing).

3. **Speaking.** The student communicates thoughts, ideas, information, and messages orally by speaking fluent standard English with individuals or groups and using appropriate behaviors such as eye contact, posture, and gestures as measured by a minimum grade of "B" in college Speech 101 (Fundamentals of Speech Communication) or a "C" or better in college Speech 160 (Business and Professional Speech).

4. **Math.** The student demonstrates computational skills and knowledge of basic mathematical functions (adding, subtracting, multiplying, and dividing whole numbers, decimals and fractions; computing percents; and interpreting charts and graphs) by choosing appropriately from a variety of mathematical techniques to solve practical problems as measured by a "C" grade or better in a college-level intermediate algebra class or a higher level math class.

THINKING SKILLS

5. **Problem-Solving.** The student recognizes problems and devises and implements plans of action by writing short papers, answering essay questions, and analyzing case studies in group discussions, role playing, and simulations in the classroom and through monthly evaluations by workplace supervisors.

6. **Decision-Making.** The student makes decisions by defining goals and obstacles, generating and evaluating alternatives, and choosing the best plan of action by writing short papers, answering essay questions, and analyzing case studies in group discussions, role playing, and simulations in the classroom and through monthly evaluations by workplace supervisors.

7. **Learning.** The student evaluates efficient learning techniques and uses them to acquire and apply new knowledge and skills by successfully completing a series of workshops on learning styles.

GENERAL VOCATIONAL SKILLS

8. **Information Processing.** The student demonstrates understanding of information processing by correctly identifying a variety of methods and formats for organizing information/data, efficiently organizing data for entry, accurately entering and storing documents and files, correctly printing and distributing information, and checking documents for spelling, grammar, and accuracy as measured by a "C" grade or better in required course(s) and the satisfaction of the workplace supervisor.

9. **Basic Computer Operations.** The student demonstrates understanding and application of basic microcomputer concepts and operations by entering, editing, and storing data in appropriate formats as measured by a "C" grade or better in the required course(s).

10. **Spreadsheet Software.** The student applies basic concepts and knowledge of spreadsheet software by modifying existing spreadsheets, creating formulas and new spreadsheets, and printing the spreadsheet with two or fewer minor errors according to specified formats and parameters provided by the instructor or workplace supervisor.

11. **Database Software.** The student applies basic concepts and knowledge of database management software by modifying existing databases, creating new ones, and printing reports with two or fewer minor errors according to specified formats and parameters provided by the instructor or workplace supervisor.

12. **Keyboarding.** The student has keyboarded at 40 words per minute with a maximum of three errors on a three-minute timed writing.

13. **Processes Mail.** The student sorts, prioritizes and routes a variety of incoming and outgoing mail and describes the various procedures for sending outgoing mail (e.g. UPS, Federal Express, messenger service) to the satisfaction of the workplace supervisor.

14. **Business Etiquette.** The student displays a cooperative, helpful attitude by greeting visitors/clients, making introductions, escorting them appropriately, and offering assistance resulting in visitor/client satisfaction on an ongoing basis to the satisfaction of the workplace supervisor.

15. **Telecommunications.** The student performs telecommunications activities by demonstrating basic knowledge of telephone functions, exhibiting proper telephone etiquette and procedures, taking and leaving clear and coherent voice mail messages, and correctly preparing documents to be faxed on an ongoing basis to the satisfaction of the workplace supervisor.

16. **Office Equipment.** The student displays familiarity with basic office equipment by identifying, using, and performing simple maintenance on a 10-key calculator, photocopying machine, microcomputer printer, typewriter, fax machine, and multi-line telephone to the satisfaction of the workplace supervisor.

17. **Filing.** The student demonstrates filing skills by establishing an alphabetic, geographic, subject, and numeric filing system and retrieving materials from these systems as measured by a passing grade in a filing test in an office procedures class.

18. **Written Business Communication.** The student creates mailable business documents by generating business letters, memoranda, research themes, formal business reports, meeting minutes, simple procedural documents, job descriptions and performance evaluations in clear and grammatically correct writing which effectively uses business vocabulary and proper formats to the satisfaction of the workplace supervisor.

19. **Oral Business Communication.** The student delivers effective oral business communication by making recommendations to supervisors and co-workers, giving directions clearly and concisely in routine and pressure situations, responding appropriately to nonverbal or implied communication, speaking tactfully, and not using slang as evaluated by the workplace supervisor.

20. **Trains Employees.** The student effectively orients his/her peers to their job duties as measured by a satisfactory evaluation by the workplace supervisor.

21. **Customer Relations.** The student demonstrates effective customer relations skills by establishing a positive rapport with customers, offering options/alternatives to meet a customer's needs, referring customers to appropriate departments, and resolving misunderstandings and conflicts or referring the problem on as measured by customer and workplace supervisor satisfaction on an ongoing basis.

INDUSTRY-SPECIFIC KNOWLEDGE AND SKILLS

22. **General Business Concepts.** The student demonstrates proficiency in basic concepts of general business organization; economics; marketing, sales and distribution; management; personal investment fundamentals; and business law by achieving a minimum cumulative 2.5 grade point average in academic courses covering these areas.

23. **Financial Services Concepts.** The student demonstrates understanding of the financial services industry by describing the basic function and operations of the finance, insurance, real estate, brokerage, and accounting sectors and identifying career opportunities in each sector as measured by a "C" grade or better in an Introduction to Business class.

24. **Accounting/Bookkeeping.** The student understands basic accounting principles by recording entries in journals and ledgers according to generally accepted accounting principles as measured by a "C" grade or better in an accounting fundamentals class.

25. **Vocational Area.** The student demonstrates understanding of technical terminology, basic operations, and if appropriate, relevant information sources for research purposes for a specific vocational area as measured by the satisfaction of the teacher and workplace supervisor on his/her summary report on each workplace experience.

EMPLOYABILITY SKILLS

26. **Consumer Economics.** The student incorporates the principles of sound consumer economics by developing a workable personal budget which reflects a realistic salary as measured by a passing grade on his or her budget project.

27. **Job-Seeking.** The student demonstrates effective job-seeking skills by identifying employment opportunities, applying employment-seeking skills, and interpreting employment capabilities as evaluated by interviewer(s) for work placements.

28. **On-the-Job.** The student exhibits sound on-the-job practices by demonstrating appropriate work behavior, attendance, and punctuality; accurately completing forms; understanding personal corporate benefits; maintaining a safe and healthy environment; maintaining a businesslike image; and demonstrating flexibility as measured by a satisfactory evaluation by the student's workplace supervisor.

PERSONAL QUALITIES

29. The student displays desirable attitudes including responsibility, self esteem, sociability, self management, integrity, honesty, enthusiasm, and a willingness to learn by satisfactorily completing the prescribed coursework and work-based learning experiences required through the Career Preparation Initiative with a minimum cumulative grade point average of 2.5 and adhering to the program's social and academic policies.

CAREER PREP EDUCATIONAL PHILOSOPHY

The Career Preparation Initiative in Financial Services is designed to provide students with both career competencies in the financial services industry and a foundation of basic academic skills, emphasizing thinking skills, decision-making skills, and communication skills. Through this joint venture between business and our schools, personal qualities leading to professional success are developed and the student is prepared for employment, a professional career, and continuing education.

This education is effectively developed and delivered only through a genuine partnership at all levels between the educational and employer communities. Both demonstrate their commitment to this educational approach by identifying and delivering essential responsibilities and resources.

Within the educational community, the secondary and post-secondary partners are committed to delivering a quality educational program. The curriculum is articulated so that students are provided with a "seamless" or continuous education. Technical and academic curricula are integrated throughout, with a focus on thinking skills to empower students to actively construct knowledge for themselves. Cooperative problem-solving is also essential, and students learn the importance and benefits of teamwork and interpersonal skills.

A representative cross-section of the financial services community identifies and endorses career competencies which support and complement the educational partnership. These competencies are measurable, and student achievement toward them is assessed at regular intervals. Periodic internships in financial services companies allow students to learn skills in the context of real problems. Internships are sequenced so as to build upon the preceding work experience and are integrated into the total curriculum.

Teachers and workplace supervisors are equipped with the knowledge and skills needed to make this program successful. To this end, they work with the employer and educational communities in identifying and securing the resources they require to develop and provide a quality educational program.

CAREER PREPARATION INITIATIVE - FINANCIAL SERVICES
PROPOSED ACADEMIC AND SOCIAL POLICY

To encourage the development of desirable attitudes and job behaviors on the part of students in the Career Preparation Initiative in Financial Services (CPI-FS) such as responsibility, self-esteem, sociability, self management, integrity, honesty, and a willingness to learn, the following academic and social guidelines are recommended.

To remain a student in good standing:

1) 95% of all assignments are completed;
2) 90% of all classes are attended;
3) dress and grooming codes are followed; and
4) a cumulative grade point average of 2.5 in CPI-FS classes is maintained after the first semester in high school and college.

Students are withdrawn for violations of disciplinary policy of participating educational institutions, including but not limited to cheating, theft, fighting, or excessive tardiness or absenteeism. Students' academic performance will be reviewed periodically and academic probation will occur if improvement is not made within the specified timeframe.

All students are to review this policy with a program administrator or faculty member and sign a form indicating their understanding and agreement to abide by its terms.

CPI-FS CURRICULUM COMMITTEE
Scope of Work and Assignments

1. Review existing programs of study and course outlines for the Chicago Academy of Finance at the high school and community college levels to determine:

   a. where learning objectives are addressed (by class and within course outline)
   b. identify which, if any, objectives are not addressed
   c. recommend new classes to address these objectives
   d. recommend substitution of classes which do not address objectives
   e. recommend changes to course outlines
   f. recommend timing and programming for three work-based learning experiences

   C. Brown, D. Brownstein, C. Franz, R. Johnson, M. McPherson

2. Develop a work-based learning component which identifies specific, measurable objectives to be addressed by students' supervisors and assessment instruments for each of the three work experiences. Also recommend appropriate training, training resources, timetable and materials for supervisors.

   J. Lombard

3. Recommend teacher training/development activities, methods, resources and timetable at the high school and college levels.

   Entire Committee

4. Write an academic philosophy describing our targeted student.

   Entire Committee

5. Develop a student portfolio assignment that will span the entire four year program and reflect individual growth and mastery of many of the CPI-FS competencies. A work journal should be incorporated into this and at least one face-to-face student evaluation should be included.

   Entire Committee

6. Identify external resources and internal/external support needed to achieve curriculum-related products described above.

   Entire Committee

JONES METROPOLITAN HIGH SCHOOL
606 SOUTH STATE
CHICAGO, IL 60605

ACADEMY OF FINANCE PROGRAM

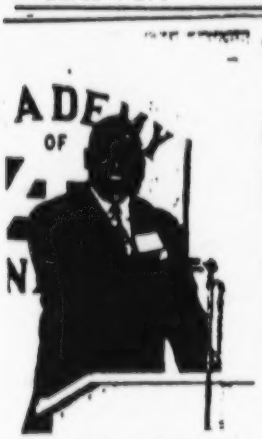
ITEMIZED LISTING OF INSTRUCTIONAL MATERIALS:

DESCRIPTION	REQ/BUCKET NO.	TOTAL
Chicago Sun-Times Instructional Materials Classroom Newspapers-daily	IM#1392570	$105.00
Simon & Schuster Instructional Materials 40 Textbooks-Pageant of World History/Teacher's Edition	IM#1392542	1,408.77
Scott Foreman Instructional Materials 44 French textbooks	IM#1392544	1,007.55
Scribner Educ Publishers Instructional Materials 30 textbooks-Understanding Lit.	IM#1392603	945.00
Bantam Doubleday Instructional Materials 30 textbooks, English	IM# 1392607	342.00
Simon & Schuster Instructional Materials 40 textbooks/Pageant of World History/Teacher's Edition	IM#1392694	1,408.77
Scott Foresman Instructional Materials 30 Math Project textbooks 1 Visual aid pkg/1-IBM PKG.	IM#1392632	1,166.72
American Bankers Assn Instructional Materials 40 textbooks-Principles of Banking/Teacher's edition	IM#1392693	1,178.00

DESCRIPTION	REQ/BUCKET NO.	TOTAL
Southwestern Pub. CO Instructional Materials 30 ACCOUNTING I-working papers/guides 30 ACCOUNTING I worksheets 60 Problem Tests 30 rulers 30 Objective tests Overhead projector calculator	IM1392636	713.95
SCOTT Foresman Instructional Materials 28 Hardbound Student Texts DI-Moi Level French 28 Practice sheet workbooks 28 work tape Manual/1 audio test	IM#1392637	1,509.99
SCRIBNER ED. Pub. Instructional Materials 30 textbooks/Understanding Literature	IM#1392638	945.00
D & S Marketing Systems Instructional Materials 1-Graphic calculator	IM#1392692	76.95
Bantam Doubleday Instructional Materials 30 Early African AMER. Classes 30 Four Great Amer. Classics 30 Do YOU Like It Here	IM#1392631	432.00

JONES REPORTER

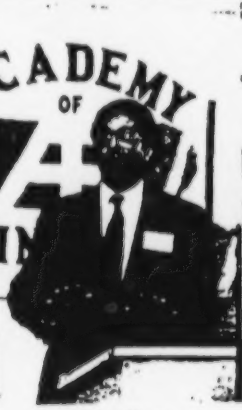
VOL. 22 - NO. 1 | JONES METROPOLITAN HIGH SCHOOL OF BUSINESS & COMMERCE | SEPTEMBER 1991



Christopher P. Gardner, Manager, Gardner Rich & Co. Chicago Academy of Finance Advisory Board.

Selvia M. Brady, Chancellor, City Colleges of Chicago, Chicago Academy of Finance Advisory Board.

Susan Zimny, Director for Program Adm., National Academy Foundation.



Bernard Spillman, Assistant Superintendent Chicago Public Schools.

Annie B. Miller, Academy of Finance, Teacher Specialist, Jones Metropolitan High School.

Diana Robinson, Director of Programs, Harold Washington College.

Donald E. Brown, Chairman Chicago Academy of Finance Advisory Board, President Effective Management Technologies

Initiation Of The Academy Of Finance

by Anabel Andrango

As all of us waited anxiously for the commencement of the program, I was able to talk to a parent and ask her reaction to this ceremony for the students who are part of Academy of Finance.

She was very proud of her daughter and she was so excited as she had never experienced such an occasion.

Finally, Mrs. Buckney came up to the podium and requested everyone's attention to the beginning of the program. First she expressed her emotions about the Academy of Finance. "We have worked diligently with the Business Council for over six months to be able to have this moment."

Donald E. Brown, Chair of the Chicago Academy of Finance Advisory Board was next on the podium. His expressions of endearment were something like this: "I feel like a proud father today! For six months I have been waiting for this baby." The surprise was that each and every single student of the Academy of Finance would qualify for a scholarship which would in turn enable them to go to any college they would like to attend. The requirements were: 1) The student must be eager enough to want to go to college. 2) A student must be enrolled in the Academy of Finance curriculum. 3) Also the students who are satisfactorialy in the curriculum will also have a paid summer internship which will be in the business community. 4) The student, in order to receive a scholarship, must have a B plus average, and have a 95 percent attendance rate to qualify.

After the presentation by Mr. Brown, Mrs. Buckey and Ms. Ann Miller introduced the charter class of the Academy of Finance.

The students were: William Alexander, Norma Aranda, Lakeisha Beans, Asantewaa Beasley, Lakena Boyd, Nicole Clark, Willie Curry, Pehar Durden, Giovanna Espinoza, Cherrie Little, Jacquelyne Little, Venita Lockett, Tamara Mckenzie, Latre Morrow, Shaneen Newton, Timothy Parker, Tekenya Peek, Ivy Porter, Hubert Ptak, Deborah Rainey, Shelley Riggs, Esmeralda Roque, Helen Rucker, Beatriz Sanchez, Irma Sanchez, Patricia San Martin, Howard Schabow, Cheryl Scott, Tasha Underwood, Jaime Villanueva, Tamara Wright.

Next up was one of the most influential ladies, Diana Robinson, the Chair for City Colleges of Chicago. She emphasized the fact that Jones Metropolitan High School is the only high school to have such a curriculum and the only one to have an internship program in the business community. The only one in the city of Chicago! What an honor.

Following Diana was the Superintendent of Chicago Public Schools, Ted Kimbrough. He has been in public education for over 36 years and he was also a principal of a school but he mentioned he had never seen such motivation in a class. One thing he made clear was that 95% of the class was a minority. But this was a good sign to the business community, for it shows the minority groups are recognizing the value of an education and especially in the business environment. One of the speakers said she felt as if she had given birth to the greatest thing ever, "I've just gone through an immaculate conception!" But in general each speaker was proud to say that this was the future generation of the work force. And they're pretty happy it's people with such a background, not only educational terrain but also a wide variety of backgrounds such as ethnic, cultural and basically moral. At the Jones Reporter we hope that these students realize that they have a chance in a lifetime and that they shouldn't waste it. We wish you the best and hope you come out on top just like all Jonesites do when they are doing their best.

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JONES REPORTER

VOL. 22 - NO. 3 JONES METROPOLITAN HIGH SCHOOL OF BUSINESS & COMMERCE NOVEMBER 1991

Academy of Finance Breakfast Meeting

THE ACADEMY OF FINANCE SALUTES ARTHUR ANDERSEN

by Liliana Cortez

On Tuesday, October 22, 1991, the Academy of Finance saluted Arthur Andersen & Co. during a breakfast meeting here at Jones Metro.

Although I was a few minutes late for the meeting, I was there on time to listen to the first speaker, Michael J. Richards, with whom I had the pleasure to speak. He spoke of the company's distribution of 300 offices in 36 countries, and its primary business that is accounting. Mr. Richard is the manager and he has many duties besides being manager, such as helping other companies with bookkeeping; providing services to help customers with accounting; and working in the consulting division helping computerized companies to run their systems.

Next up to the podium was Dallas Creitlon, who is a tax consultant for Arthur Andersen & Co.. He works in the consulting division designing computer systems for different companies that will aid them with their personal accounts, and is currently working on a system of personal computers for managers.

Introduced next was Lauren Claire, who works in the Audit Section. She has worked for Arthur Andersen & Co. for two years. In the Audit Section some of their duties are to prove what their clients own and possess is legal and true, and they issue control letters.

Up next was Bruce Williams, who is responsible for staff and works in the tax division. He mostly works helping to set up divisions that strictly work with wealthy families to prepare their tax returns. Their commercial division is a multinational corporation.

After all the guest speakers stepped up to the podium, Ms. Miller made an introduction of the Chicago Academy of Finance Charter Class of 1991, and introduced the Academy staff teachers: Ms. Maggie Culver, Accounting; Mr. Joseph Zale, Economics; Ms. Merle Tillery, French; and of course Ms. Miller herself as the Academy of Finance Coordinator.

Afterwards there was a special thanks given to Mr. David Rosen from the Chicago Board of Education and the students had the opportunity to ask questions to the special guest speakers.

Finally, there was a special recognition of the Academy of Finance class officers, who are:

PRESIDENT: Adrienne Farmby.
VICE-PRESIDENT: Latrese Hardnick
SECRETARY: Ceetter Carpenter
ASSISTANT SECRETARY: Nora Vera
TREASURER: Cheryl Ann Scott

The Academy of Finance students will have the opportunity to participate in a summer internship and each student is guaranteed a $2,000 scholarship, based upon 95% attendance rate and 3.56 GPA.

All in all, this was a great opportunity for the Academy of Finance students to learn of the great and magnificent job world that awaits them. So, guys and girls, keep up the good work and show you're the best!

Lauren Claire of the Arthur Andersen Co. pictured at the breakfast meeting.

Michael Richards, Manager for Arthur Andersen & Co. and student Salvador Guerrero.

Members of the Jones staff, our principal and Diana Robinson of the Chicago Academy of Finance pictured at the breakfast meeting.

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Attachment 1

JONES REPORTER

VOL. 22 - NO. 4 JONES METROPOLITAN HIGH SCHOOL OF BUSINESS & COMMERCE DECEMBER 1991 / JANUARY 1992

Academy of Finance Hosts Northern Trust

John Frederick and Hubert Ptak meet William Satterstrom, Senior Vice President of Northern Trust.

Mike Tortorello of American Express (left, which will be guests of AOF in February) poses with speakers from Northern Trust Michele Clark, Robert Saunders, Graciela Iturbe, William Setterstrom, Mary Kovarik and John Frederick.

The representative from American Express Mike Tortoello talks with AOF students Giovanna Espinoza and Salvador Guerrero.

and dedication to be the best, and even if they were not on the honor roll, it doesn't mean they are not doing well." He is proud of the Jones students' initiative, and Jones will definitely set the pace for other schools.

Alan Dean was invited by Diana Robinson and was greatly impressed by our program. He admitted he didn't even know of Jones' existence, but his first impression of the Academy and Jones was so positive that he predicted that the commitment of the students and staff will help Jones to flourish.

Northern Trust Bank Meets With The Academy Of Finance

by Tamara Wright

The Academy of Finance kicked off another successful breakfast for the month, which took place Wednesday, December 18, 1991. This is the third breakfast that the Academy of Finance has had and this time it was with **The Northern Trust Company.**

Many encouraging words were said by some important people. Those important people were **William Setterstrom,** Senior Vice President of Corporate Training; and Marya Kovacik, who designs and teaches courses for choice options. All were welcomed and greeted by the Academy of Finance students, staff and Cozette Buckney, our principal. The Academy of Finance was recognized for some outstanding accimplishments and for the enthusiasm that was shown to our guests. The Academy of Finance is making so many moves right now. This is the Charter Class of Academy of Finance and everyone is looking over each others backs to help. There's a lot of hard work and the taking of a lot of challenges but by having these breakfasts and meeting these important people, their encouragment helps us and our fellow classmates, and also our teachers, to go further with the Academy of Finance.

It is a great opportunity for anyone who wants to know what the work force is all about and what it takes to reach those standards that will help you achieve in getting into the work force.

Along with Northern Trust Bank, Mike Tortorello, American Express, was here to acknowledge the Academy of Finance. That will probably be the next company that will meet with the

Recognition For Academy Of Finance Students

by Liliana Cortez

On Tuesday, November 26, 199[illegible], Jones hosted the Academy of Finance Awards Breakfast in the auditorium foyer in recognition of the students for their perfect attendance and academic achievement.

The event began with an introduction of our principal, Mrs. Buckney, by the AOF Junior Class President, Adrienne Farmby. Mrs. Buckney gave a welcoming address to the students, staff, and special guest speakers—Donald E. Brown, Chairman of the Chicago Academy of Finance Advisory Board; Alan Dean, Chief Financial Officer of the Chicago Board Options Exchange; and Diana Robinson, the Chicago Academy of Finance Program Director. Each guest speaker presented remarks to the gathering, and the awards were then presented by Mrs. Buckney for perfect attendance and or honor roll. After the awards presentation there was a reception given in the place of attendance.

In an interview with Diana Robinson, she said that "the success of Jones will determine if the AOF program expands into other high schools." She also gave the three major reasons of why Jones was chosen for the program: (1) for being a unique school and the only high school in the country that's a two-year business high school; (2) **Jones is Business**, and (3) Jones has serious business ties with the business community, giving many job opportunities for the students.

Donald E. Brown said of the students that "just being in the program inspires them to dedicate themselves. They [illegible]

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Attachment N-4

JONES REPORTER

VOL. 21 - NO. 5 JONES METROPOLITAN HIGH SCHOOL OF BUSINESS & COMMERCE FEBRUARY 1992

"Academy Of Finance Salutes First Chicago National Bank"

by Liliana Cortez

On Wednesday, January 29, 1992, the Academy of Finance had the honor to have four guest speakers from the First Chicago National Bank, located in downtown Chicago.

The breakfast meeting began with an introduction by AOF Junior Class Secretary, Ceetter Carpenter, who then made for the welcome address by Mrs. Buckney. The first guest to step up to the podium was Steven Capouch, Vice-President of First Chicago. He has been with the corporation for 13 years, and also on the Chicago Academy of Finance Board for 3 years. He stated that the bank has various locations in the country and this past year it had $49 billion in assets. First Chicago is a large corporate business involved in regular transactions. Next was James Lowry, and after him James Mason, both first Scholars at First Chicago. Both talked about their experiences during the summer internship at First Chicago, and who are now currently employed at the bank. James Lowry attended Princeton University and James Mason attended Washington State University. Last to the podium was Levoyd Robinson, Corporate Banking Officer. Mr. Robinson has been with the corporation for three years, and his primry job is to call people who have not paid their loans. He received his M.B.A. from Northwestern University.

In an interview with Steven Capouch and Levoyd Robinson, I learned Mr. Capouch is in charge of the training program, and both stated that it really doesn't matter if you attend a city college. They help companies with their debts and/or figure solutions. Currently there are 17,000 people employed in the corporation, and every year they employ 500-600 people. They are always looking for smart people, butall four strongly emphasized that the main skills to succeed in the working world are to have good communication, writing, and analytical skills, but most importantly good communication skills, since that is what has put First Chicago ahead.

The February breakfast meeting will honor students on academic achievement and perfect attendance. The purpose of these meetings with high corporate executives give students the opportunity to excell and strive for more; a special recognition for the teachers involved in the academy program.

Attachment 1

JONES REPORTER

VOL. 22 — NO. 7 JONES METROPOLITAN HIGH SCHOOL OF BUSINESS & COMMERCE MAY, 1992

Academy Breakfasts With Shearson Lehman And Atlanta AOF

by Tamara Wright

The Academy of Finance has been having a tremendous number of successful breakfasts, and now Shearson Lehman Brothers can be included with the other successes.

Shearson Lehman Brothers attended a breakfast with the Jones AOF on March 27th, in the auditorium foyer. Excellent speakers represented the financial services corporation: Gloria McMahon, Senior Vice-President; Lawrence Geraghty Jr., Senior Vice-President; Michael Skinner, Vice-President; and Al Thomas, Financial Consultant, who left us with this thought, "Going and getting the education is worth it. Stick to your educational goal." Some of the speakers told the AOF how they came to join Shearson Lehman, as well as about Shearson Lehman's predecessors and the company's history.

Not only was Shearson Lehman Brothers represented at the March breakfast, but the Atlanta Academy of Finance joined us at the same time. The Atlanta group, which had flown in on the 25th, enjoyed Shearson Lehman's presentation as much as the Jonesites did, and continued their trip to Chicago with a sight-seeing tour of the downtown area; they rounded out their day with attendance at the AOF Dance which was held the evening of the 27th in the Jones gymnasium.

The Atlanta AOF had a wonderful time, and told us that they loved Chicago. Thanks to the Advisory Board; Diana Robinson, Director of AOF; Dr. Buckney, and Ms. A. Miller, Coordinator of our AOF, for making all this possible.

A special apology to Americn Express for their inadvertent omission from last months's issue of the REPORTER. We appreciated American Express' taking the time to speak to the young Jonesites who are always eager to know about the workforce and what it takes to survive.

Academy of Finance Dance

by Duane Porter

The Academy of Finance dance, "You're Breaking My Heart", was held in the Jones gymnasium on Friday, March 27th, and it was a great success, due to the hard work of the Academy students and their sponsors, Mrs. Culver and Mrs. Miller.

The dance's success was further insured by the DJ, the one and only Emanuel Pippen, who started the party jumping with his musical selections.

Joining the Jones AOF students were members of the Atlanta AOF, who had joined Jones at the AOF breakfast with Shearson Lehman Brothers earlier in the day.

The dance was also the setting for the announcement of the choices for Mr. and Ms. Academy of Finance. 1992's Mr. and Ms. Academy of Finance were William Alexander and Latrese Hardnik. Timothy Parker and Tamara Wright were the runners-up.

JONES REPORTER

VOL. 22 — NO. 8 JONES METROPOLITAN HIGH SCHOOL OF BUSINESS & COMMERCE JUNE 1992

The Jones Academy of Finance hosted a breakfast for Ernst and Young on April 22, 1992, in the auditorium foyer. Participating (Left to right) were: Ms. M. Culver, accounting teacher; Ms. A. Miller, Jones' AOF coordinator; Gina Griffin, AOF student; Erik Nance, Jr., and Felicia Haraway, Junior Account Executives, Ernst and Young; Diana Robinson, Program Board; and Salvador Guerrero, AOF student.

ACADEMY TO ADMIT FRESHMEN

by LaTrese Hardnick

Jones is going to have another first, this time in September of 1992. This September, we are going to have 28 ninth-graders, who will be the Pre-Academy of Finance Students.

Students were selected for the program based on their interest in Pre-Academy programs, academic performance, a 95% attendance rate, and above-average stanine levels on the Iowa Test of Basic Skills.

In addition to the required high school classes, the Pre-Academy students will take key boarding and accounting to help prepare them for the intensive two-year Academy program. Students will also be exposed to the unique business environment here at Jones.

This two-year Pre-Academy program will insure that students interested in business are prepared to enter and be successful in the Chicago Academy of Finance.

Academy Program Wins Award

On June 11, Jones principal Dr. Buckney accepted the "Connections 2000 Ideas Program" award, presented to educators who have exhibited innovative techniques for integrating curriculum across disciplines, including the integration of academic and technical content.

The award was presented in Springfield at the Connections 92 Conference for Jones' new Academy of Finance program.

Jones was the only Chicago Public School to receive this award.

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INFORMATION CALL
Annie Miller at
312-534-8614
Jones Means Business

Pre-Academy of Finance Course of Study

Students enrolled in the Pre-Academy of Finance at Jones Metropolitan High School will take the following classes:

9th Grade	10th Grade
English I **(Honors)**	English II **(Honors)**
Social Studies	U.S. History
Algebra **(Honors)**	Geometry **(Honors)**
Biology	Science
Spanish I	Spanish II
Keyboarding I	Accounting I
Physical Education	Physical Education II
Music	Art

INFORMATION REQUEST FORM

Please send more information about the:

Pre-Academy of Finance _____ Chicago Academy of Finance _____

School Student is Presently Attending:_____

Name:_____

Address:_____

City/State:_____
Zip Code

Telephone: Home_____ Work_____

Mail to: Mrs. Annie B. Miller, Coordinator
Chicago Academy of Finance
Jones Metropolitan High School
606 South State Street
Chicago, IL 60605

ANNOUNCING THE NEW

PRE-ACADEMY OF FINANCE PROGRAM

AT

JONES METROPOLITAN HIGH SCHOOL OF BUSINESS AND COMMERCE

FOR

9TH AND 10TH GRADE HIGH SCHOOL STUDENTS

606 South State Street
Chicago, Illinois 60605
(312) 534-8600

A Program of the Chicago Board of Education
Offered in Partnership with the
Chicago Academy of Finance
A Program of the National Academy Foundation

What is the Pre-Academy of Finance?

Starting in September 1992, Jones Metropolitan High School of Business and Commerce is offering a special Pre-Academy of Finance program for 9th and 10th grade students.

This two-year academic program ensures that students interested in business are prepared to enter the Chicago Academy of Finance, which is offered only at Jones in their 11th year.

In addition to the required high school classes, Pre-Academy students will take keyboarding and accounting to help prepare them for the intensive two-year Chicago Academy of Finance program.

Students in the Pre-Academy of Finance are also exposed to the unique business environment at Jones High School. Every student at Jones is interested in a business career, and everyone must adhere to the business dress and grooming standards for which Jones has been acclaimed nationally.

Why Jones Metropolitan High School?

Jones has educated over 20,000 of Chicago's office workforce during its more than 50-year history. As the most modern business high school in Chicago, Jones features programmed learning facilities, audiovisual equipment, elevator, air conditioning, modern dining room, lecture hall and carpeted speech room. All books and business practice materials illustrate the latest methods for business education.

Jones High School is constructed like a contemporary office building and is accessible by all modes of transportation. Located in Chicago's dynamic South Loop, Jones is within easy walking distance of the city's world-class financial district, the downtown government complex, and the new Harold Washington Library.

What Will the Student Gain?

- An opportunity to begin preparing early for a career in business. In today's competitive workplace, a solid high school preparation is no longer a luxury — *it's a necessity.*

- A sense of pride in being part of a special program that expects excellence from its students and helps them to achieve it.

- An understanding of what it takes to succeed in the world of business. Students learn the attitudes, speech, and dress code employers want from them in addition to the knowledge and skills expected of business professionals.

- If all Pre-Academy of Finance program requirements are satisfactorily met, students are guaranteed admission into the Chicago Academy of Finance at Jones in their 11th year. Students from other schools may end up on a waiting list for limited space in the Chicago Academy of Finance.

Who is Eligible for the Pre-Academy?

Students interested in applying to the Pre-Academy of Finance at Jones Metropolitan High School must have:

1) Successfully completed the 8th grade in public or private school.

2) An elementary school transcript which reflects high academic performance and a 95% attendance rate.

3) Taken the Iowa Basic Skills Test in the areas of reading, math, science, English, and social studies.

4) A reading score at or above STANINE 7.

How Do I Get More Information About the Pre-Academy of Finance?

Either fill out the form on the back of this page and mail it to the address below, or telphone:

Mrs. Annie B. Miller
Coordinator
Chicago Academy of Finance
Jones Metropolitan High School
606 South State Street
Chicago, IL 60605
(312) 534-8600

****

THE ACADEMY OF FINANCE STAFF

MAGGIE CULVER

Accounting

GEORGE WILLIAMS

JOSEPH ZALE

World of Finance

EARL SILVERMAN

MERYL TILLERY

Foreign Language

ANNIE B. MILLER-COORDINATOR

JEANNE M. CAREY, ASSISTANT PRINCIPAL

WILLIAM C. MICELI, ASSISTANT PRINCIPAL

COZETTE BUCKNEY, PRINCIPAL

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OF

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DECEMBER 6, 1991

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THE NATIONAL ACADEMY FOUNDATION

and

THE ADVISORY BOARD OF THE
CHICAGO ACADEMY OF FINANCE

PRE-ACADEMY OF FINANCE BREAKFAST MEETING

DECEMBER 6, 1991

PROGRAM

INTRODUCTION OF PRINCIPAL
Academy of Finance Coordinator
Annie B. Miller

WELCOME ADDRESS
Principal, JONES METROPOLITAN HIGH SCHOOL
Cozette Buckney

REMARKS

Diana Robinson, Program Director
Chicago Academy of Finance
Harold Washington College

Cozette Buckney, Principal
JONES METROPOLITAN HIGH SCHOOL OF
BUSINESS/COMMERCE

RECOGNITION OF GUESTS
Jeanne M. Carey, Assistant Principal
JONES METROPOLITAN HIGH SCHOOL OF BUSINESS/COM.

Adjourn

GUEST LIST

JACK FELDMAN	GLADSTONE ELEM.
JOSEPH C. RISBY	ELLA FLAGG YOUNG
THERESE H. BURROUGHS	BURROUGHS
GERTRUDE COLEMAN	LIBBY
GRACE CRAWFORD WRIGHT	ANDERSON ACADEMY
JUANITA HUTCHINSON	SOUTH LOOP
JOANN PIERSANT	ANDERSON
CORINNE REDDING	EMMET
MILDRED L. GRANT	VANDERPOOL
STEVEN HELLER	BROWN SCHOOL
VERONICA PEPPERS	GARRETT A. MORGAN
ADRIENNE HUBBARD	GREELEY
CYNTHIA HANNAH	TILDEN HIGH
SHEILA YANCEY	RICHARDS
SHIRLEY ANDERSON	LINN
FRANK ABBINANTI	GARY
DOROTHY WIELGOSZ	CARROLL
CHRISTINE P. ALLEN	MADISON
MARY E. JOHNSON	MEDILL IVG
VICTOR SKALA	SCHNEIDER
LEA LEWIS	REED
MARY ANN HANSEN	BEALE
ZITA SHLAUSTAS	BOND
LILLIE KINNARD	J. N. THORP
ROBENA COLLINS	CURTIS
LAUREN DUFF	ENGELWOOD HIGH